### Reports Working Group



SPS Version 4.2

Debbie O'Rourke 23-25 April 2002



### DoD RWG Purpose

- To meet the DoD reporting needs for the SPS program.
- Team oversees the incorporation of enhancements and requirements as they relate to the reporting aspects of the SPS program in the following areas:
  - Catalog content and maintenance
  - Cube content and maintenance
  - Testing of Cubes and Catalogs
  - Course content
  - Training materials



## Membership

- Membership on the Working Group limited to 2 members from each service, for a total of 14 members
- Chairperson
  - Debbie O'Rourke
- Navy
  - Zea Shultz
  - Sherry Barnett
- Army
  - Trish Owens
  - Linda Martinson
- DLA
  - Alicia Turrentine

- Marine Corps
  - Tammy Faapouli
  - GySgt William Hepler
- Air Force
  - Tessie Dunaway
  - Larry Faems
- DCMA
  - Stephanie Strohbeck
  - Felisha Hitt
- ODA
  - Juanita Irvin
  - Lynn Maue



#### **Enhancements**

- Enhancements are for reporting ONLY
  - Catalog structure and content
  - Organization of folders
  - Nomenclature, etc.
- RWG does not make enhancements to PD2 product (JRB role)
- RWG role is to guide users in extracting data from existing databases using the existing functionality within SPS



#### **Enhancements**

- Enhancement requests from each service should be submitted to the respective RWG member for presentation to the entire RWG
- Once an item is approved by the RWG, the enhancement will receive a priority and be assigned a target release
- The Working group is working roughly one version out and in some cases 6-18 months in advance of a product release



- Upgrade to COGNOS application
  - Impromptu 6.0
  - PowerPlay 6.6
- New Catalog utilizing the enhancements to Sybase, COGNOS, and the SPS application
- Extensive Release Notes being prepared to assist the users including sample reports
- Due to the upgrade in the Cognos application and the extensive changes to the database, users will have to re-write their reports.



- PD<sup>2</sup> Standard reports have been upgraded and in some cases modified to work with the new catalog and the application structure.
- Prior to attempting to write any reports using the Version 4.2 catalog, the RWG strongly suggests that the user read the Reporting Guide and Release notes to fully understand the changes to the catalog
- The Version 4.2 catalog has been restructured to increase its usability and extend its functionality.



- The restructuring has resulted in significant changes to field definitions and folder structure between the pddodv4\_1e and the pdv42 catalog.
- Can launch multiple sessions of Impromptu. For example users will be able to run multiple reports at the same time.
- The catalog also contains additions due to the PD<sup>2</sup> v4.2 Increment 1 functional enhancements.



- Reports that are created within Impromptu will be limited to 50 tables with users receiving a warning message at 45 tables from Impromptu and a complete stop at the 50 table limit. (Currently in Version 4.1.e there is a 16 table limitation)
- The reporting files have been moved from the C:\PD2\Cognos to more closely adhere to the Microsoft Standard that places program files under the program files directory to C:\Program Files\PD2\Cognos



- "Star" fields and "Anchor" fields have been added to the catalog.
- Using the star and anchor fields when writing a report assures the retrieval of reliable data from the database.
- Star fields always serve as the main focus of the report.
- A star field in a primary folder is a mandatory field that users must include in a report in addition to using fields under the same folder or its subfolders.



- The star field is the first field in every primary folder and is surrounded by double asterisks (\*\*), for instance under Procurement → Pre-Award/Award the star field is \*\* Award PIIN / Award Modification PIIN \*\*.
- Every primary folder in the catalog contains a star field and reports can only contain one star field at a time though they may contain multiple anchor fields.
- An anchor field is a field that users must add to a report if they include any field from a subfolder that contains that an anchor field.



- Anchor fields do not display in all subfolders.
- If a subfolder has an anchor field, it is always the first field in the subfolder and is surrounded by a single asterisk (\*), for instance under Procurement → Pre-Award/Award → PR Information the anchor field is \* PR / PR Mod Number\*.
- The Award PIIN fields continue to report all contract types, which includes DOs, TOs, and all modifications.



- The catalog eliminates the separate subfolders for DOs and modifications and replaces them with specialized fields to report relationships between all contract types.
- The Award Information subfolders, under the Requirements main folders, have been extended to include all the data found in the Pre-Award/Award folder.
- Award Information subfolders now allow reports to include more data about the awards that are related to Purchase Requests (PRs).



- The PR Number field reports both PRs and PR modifications.
- Reports will now be able to include the same information for PR modifications as for PRs
- The PR Information subfolders, under Pre-Award/Award folders, have been extended to include all the data found in the Requirements folder.
- The PR Information subfolders, under Pre-Award/Award folders, have been extended to include all the data found in the Requirements folder.



- PR Information subfolder now allows reports to include more data about the PRs that are related to awards.
- CLIN Information subfolders now include Line Item Tracking subfolders. The Line Item Tracking subfolders allow reports to be created to view relationships between procurement documents at the line item level.
- CLIN Information subfolders now include Funds Validation subfolders



- Reports can be created to track the commitment and obligation of funds back to a source PR line item. The information that is displayed is coming from the Line Item Funding Status window within the SPS application.
- CLIN Information subfolder now has Requirement Status subfolders.
  - Reports can be created detailing the associations and information from the new document-level and line item level fields on the PR.



- This requirement is the result of a PD<sup>2</sup> enhancement that enables the user to create a PR that changes the scope for one or more line items on a released contract and associate the PR line items to contract line items.
- The user may also create a PR that changes administrative information for a contract and associate the two.



- Proposal Cycle Documents are a new functionality within the SPS application and have been added to the catalog in several locations
- The Proposal Cycle Documents subfolders contain two subfolders in order to provide estimating documents and Pre- and Post-Negotiation Position (PNP) information.
  - Estimating document related fields track the information found primarily on the Pricing and Cost Detail tabs of estimating documents in PD2.



- Other fields provide for the tracking of fields found on the Contract Info tab of estimating documents in PD2.
- The PNP-related fields track the information found on the Pricing, Cost Detail, and Conditions tabs of the PNP document in PD2.



## **DoD Wide Repository**

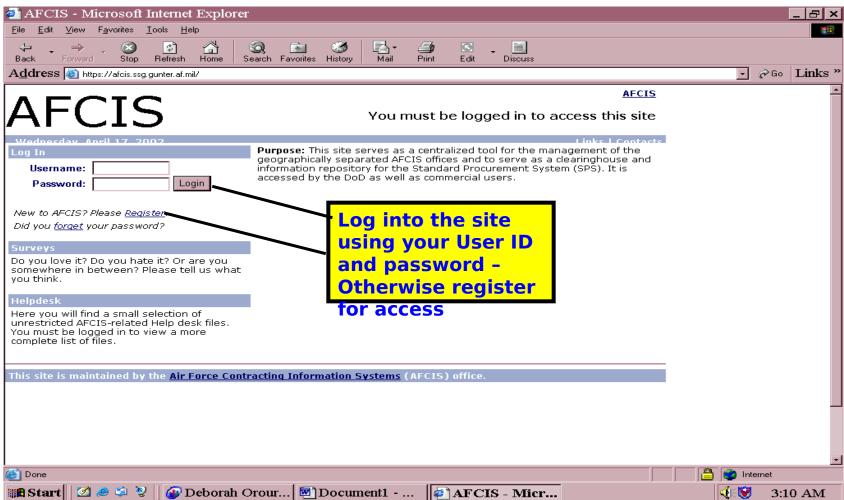
- Hosted by the Air Force
  - Registration is required for access
  - http://afcis.ssg.gunter.af.mil/
- Contains reports developed by all services and submitted by RWG members
- Complete documentation for each report is provided
- Provides search function by report fields
- RWG members provide reports for each new catalog within 2 weeks of the acceptance and release of a catalog



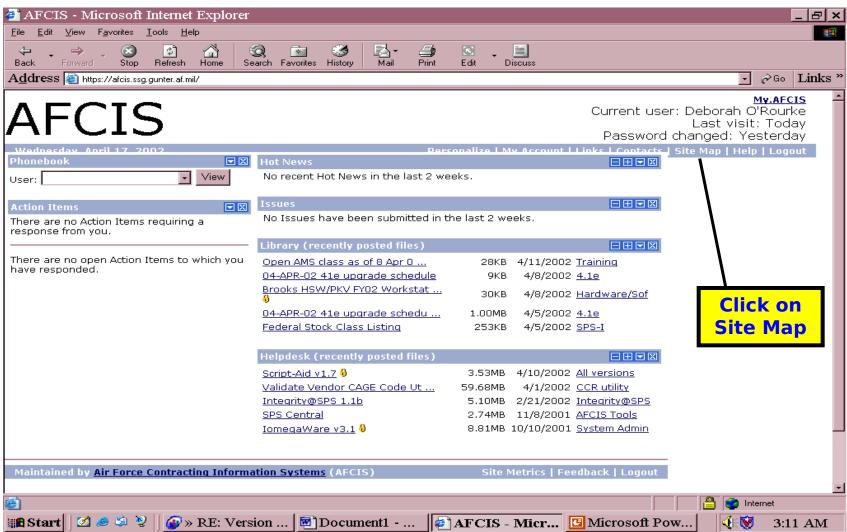
### Report File contents

- Zip file contains
  - Zip title includes the name of the report
  - Report itself (.imr, ims, Pre.imr, etc.)
  - Word document with report notes
    - Folders fields came from
    - Filters used
    - Prompts included
    - Snap shot of the report
    - Other info

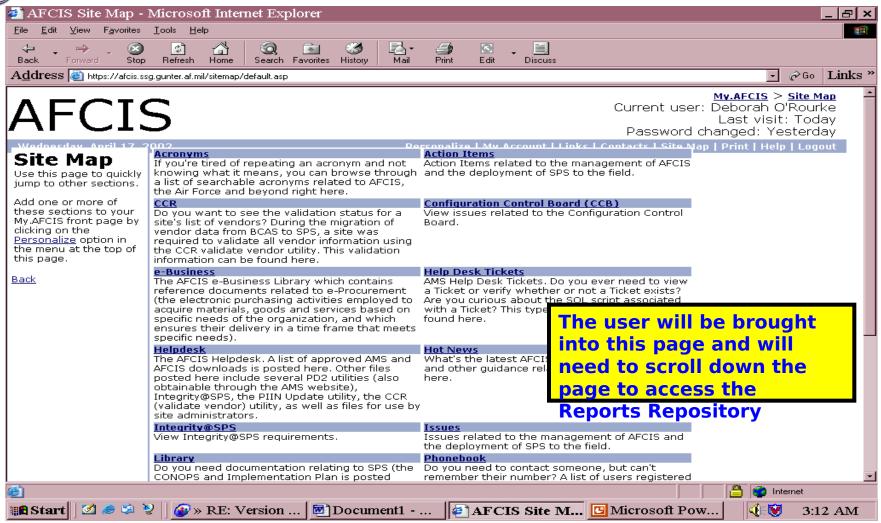




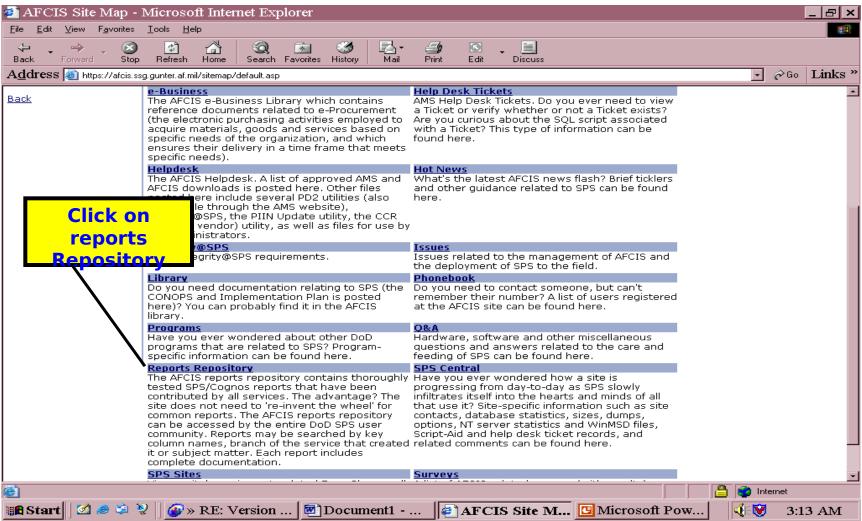




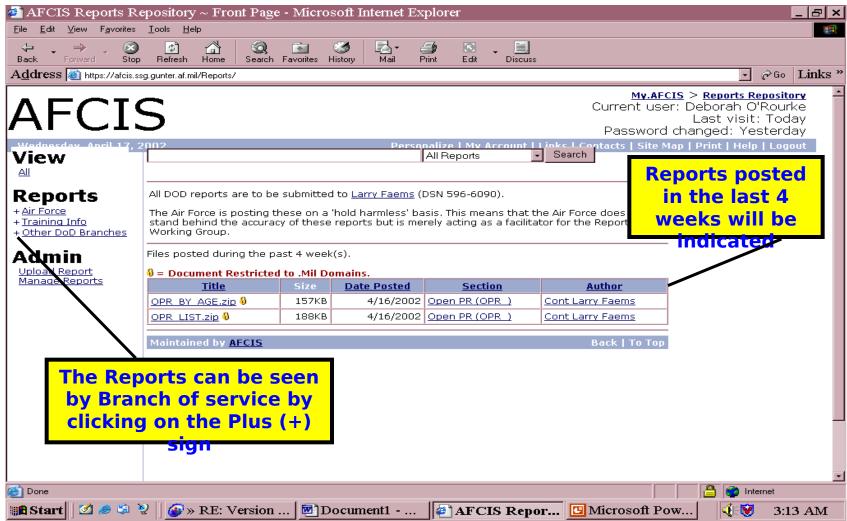




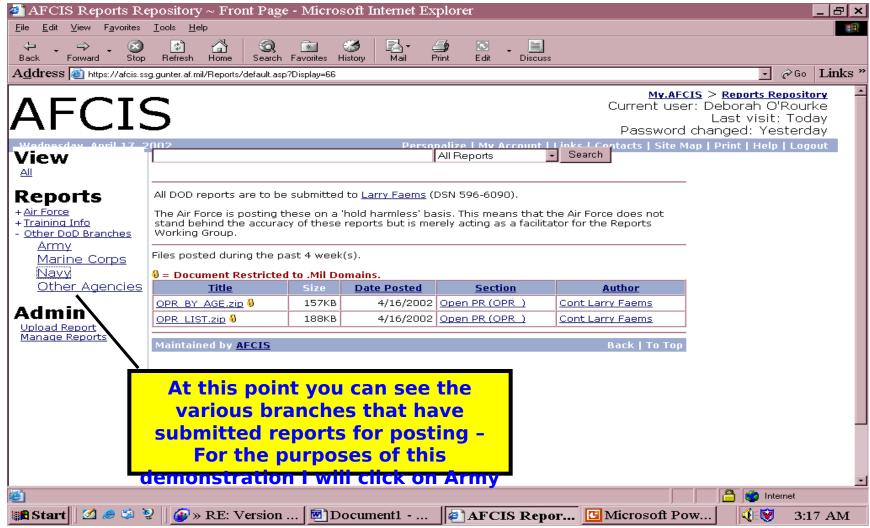




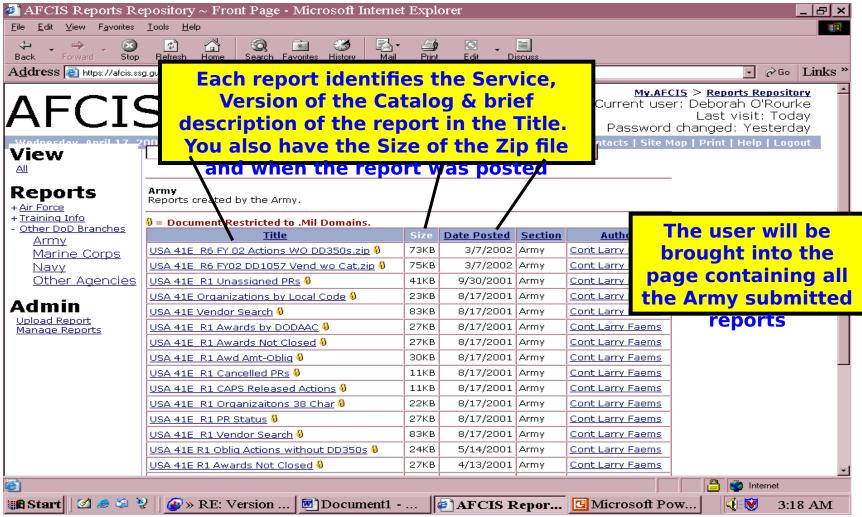














### Reports Repository

- Training Section currently contains all the Cognos Quick Guides that the RWG has created to date
  - Downloading catalogs
  - Importing reports
  - Switching between catalogs
  - Using calculated fields
  - Using Hot files
  - Using Dataset reports
  - Plus many more
- The Quick Guides for Version 4.2 will be done as quickly as possible after acceptance of the product to assist users



## Seek help

- There are many experts in the report writing area within the government. The following chain should be followed to ensure your issues/problems are elevated in a timely manner.
  - Contact your local experts
  - The local experts contact your command experts
  - The command experts contact the RWG members
  - RWG members contact the DoD RWG members
  - AMS Help desk support



## Questions?